



How to Combine Sustainable and Factor Investing?

**Seminar, British Ambassador's Residence, Oslo
Wednesday 11th March 1400 – 1800**

PROGRAMME

- 14:00-14:30** Registration, tea and coffee
- 14:30-14:40** Welcome and opening remarks
British Ambassador and Nils-Odd Tønnevoll
- 14:40-15:00** How we discovered sustainable and factor investing and how it has developed
Richard B. Stott
- 15:00-15:40** Sustainable and factor investing strategies in practice
Jim Whittington
- 15:40-15:50** Tea, coffee and refreshments
- 15:50-16:20** How we implement sustainable and factor strategies in our portfolios
Richard B. Stott
- 16:20-16:30** Closing remarks
Nils-Odd Tønnevoll
- 16:30-18:00** Wine and tapas reception with opportunity to talk to speakers



Dr. Nils-Odd Tønnevoll is a founding partner of Connectum, which was established in 2002. He is educated Siviløkonom from Heriot-Watt University, MBA from Strathclyde University Graduate Business School and was awarded an Honorary Doctorate from Heriot-Watt in 2011. He has 28 years of financial advisory experience and board directorships, of which the first 10 from corporate finance and the last 18 from investment advisory in Connectum advising private owners, entrepreneurs and professionals and their families.



Richard B. Stott is the other founding partner in Connectum. He was educated in the UK and Germany in business, accountancy and finance and worked with wealth management in Coutts Private Bank, Radcliffe Trustees og J. Rothschild International in Geneva prior to co-founding Connectum in 2002. He has extensive financial services experience from advising owners, entrepreneurs, expats og internationals, of which the last 18 years in Connectum and is a co-author of «The 7 Secrets of Money».



Jim Whittington, Portfolio Manager and Vice President, Dimensional Fund Advisors, is responsible for the day-to-day portfolio management and oversight of a number of London-based developed and emerging markets funds. Prior to joining Dimensional, Jim spent a number of years working within the sphere of exotic equity derivatives in London and Hong Kong. He has held a variety of roles, from risk system developer to trader and manager at ABN AMRO, JP Morgan, and Merrill Lynch. Jim received a BA with honors from Oxford University and his MBA from China Europe International Business School.

The seminar will mainly be in English.